User Manual

Email

Sending emails from MAX

- **Monthly Newsletters**
  - Sent automatically to everyone in your database with an email address.
- **Broadcast Emails**
  - Can select from a list off preapproved emails to send to anyone in your database. Single or multiple recipients.
- **Quick Emails**
  - Can send a personal email to anyone in your database directly from the contact record page.
- Are delivered in the manner received. Delivery times are generally less then 1 hour.
- Each email sent should be to an email address corrected in the lead or by you. These are “permission based” email address.

Emails in MAX

- All emails are given tags so you know what was sent to them.

- You are able to track if your email was viewed.

- You can track if links in your emails were clicked.

- Emails are sent from you at your system email address.

- If anyone responds they are tracked in your system. The response is added to the bottom notes section and your record gets a tag of INBOX.

Newsletter

Welcome to Our February 2013 Issue!

Insights: your monthly information resource

I hope you're doing well as we make our way through mid-winter. Remember – those spring flowers will soon be back.

This issue has some important Medicare information, fitness tips, information about a type of insurance that can earn cash, and – of course – another tasty recipe I hope you'll try.

If I can assist with your insurance and financial services needs, use the information above to contact me. I work with all facets of retirement planning and healthcare coverage for seniors. I'll do my best to answer your questions about the changing state of Medicare and about your financial needs.

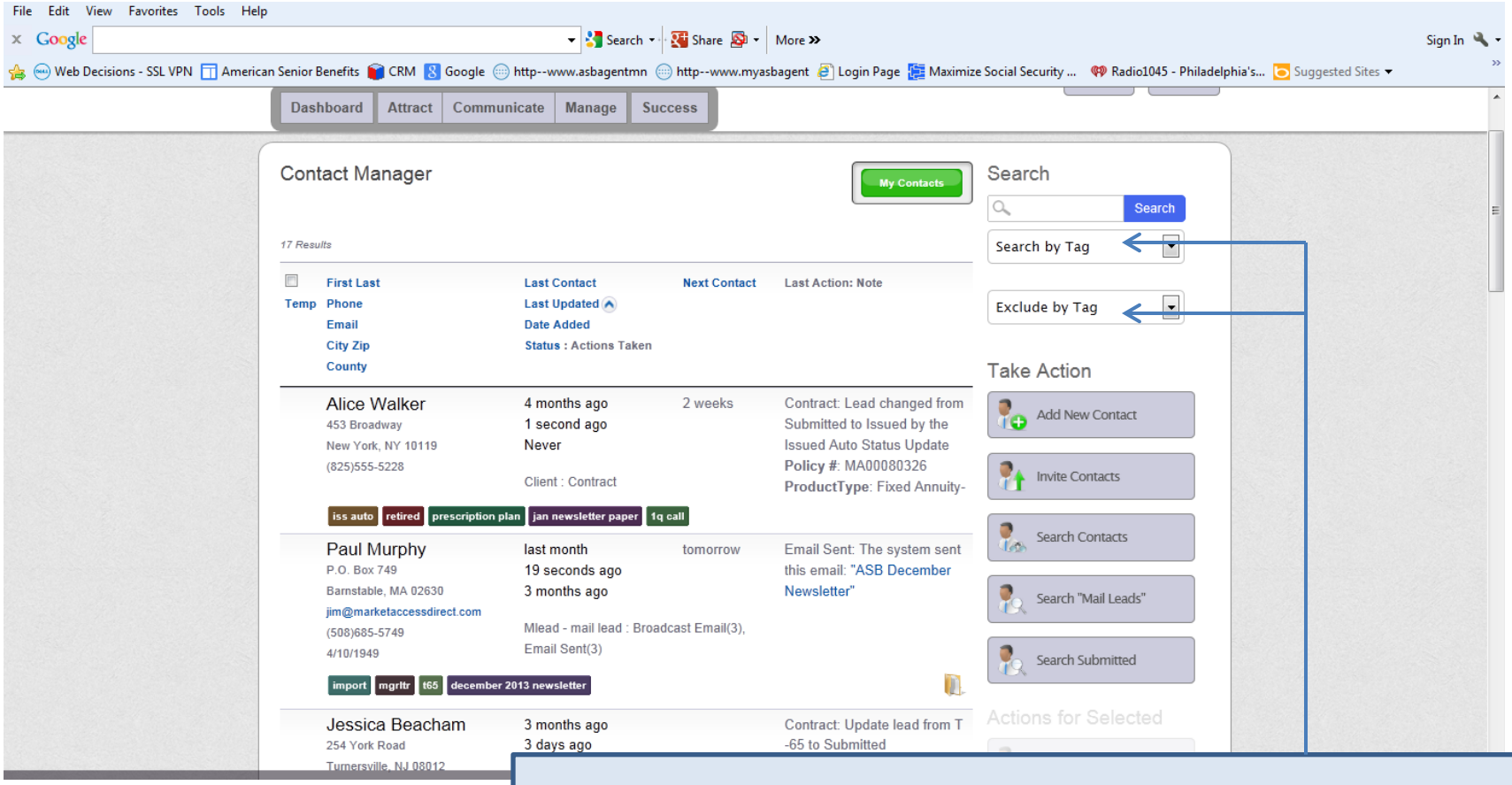
Spring's coming – get in shape

While chilly temperatures and snow may still be around in

Your picture here.

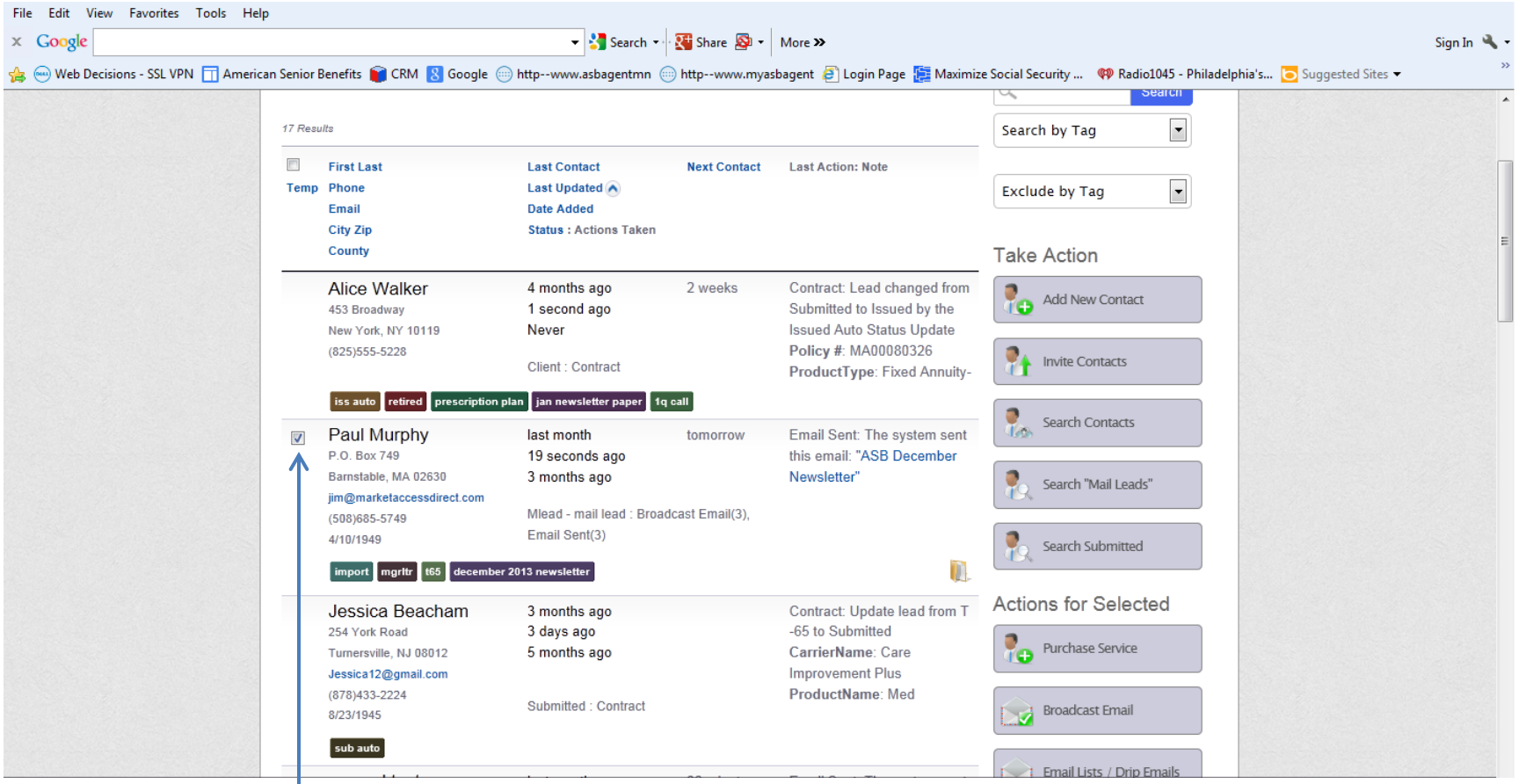
Sent automatically to everyone in your database with an email address

Sending a Broadcast Email



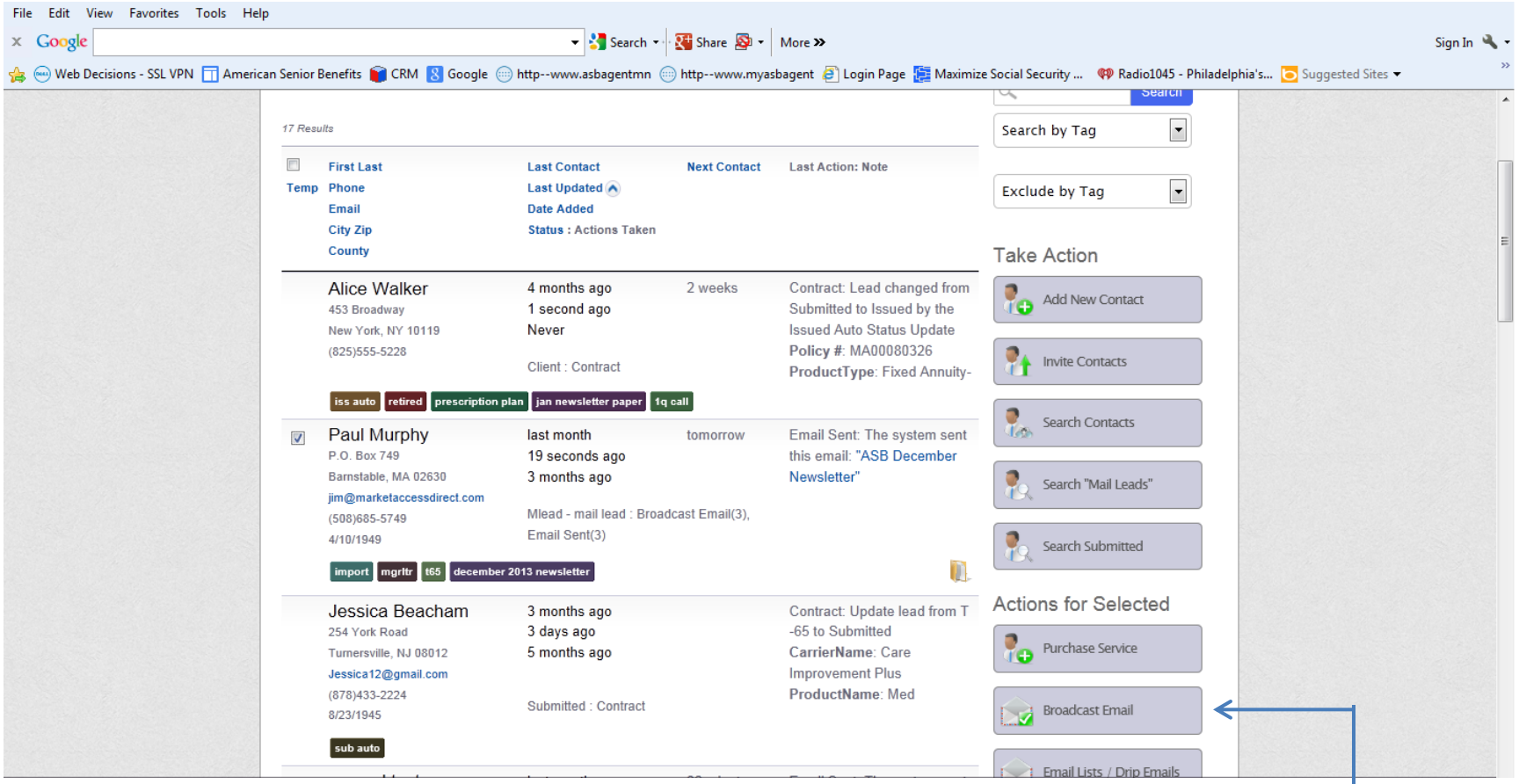
Use the tag selector and search box at the top right to create your email list.

Select Contacts



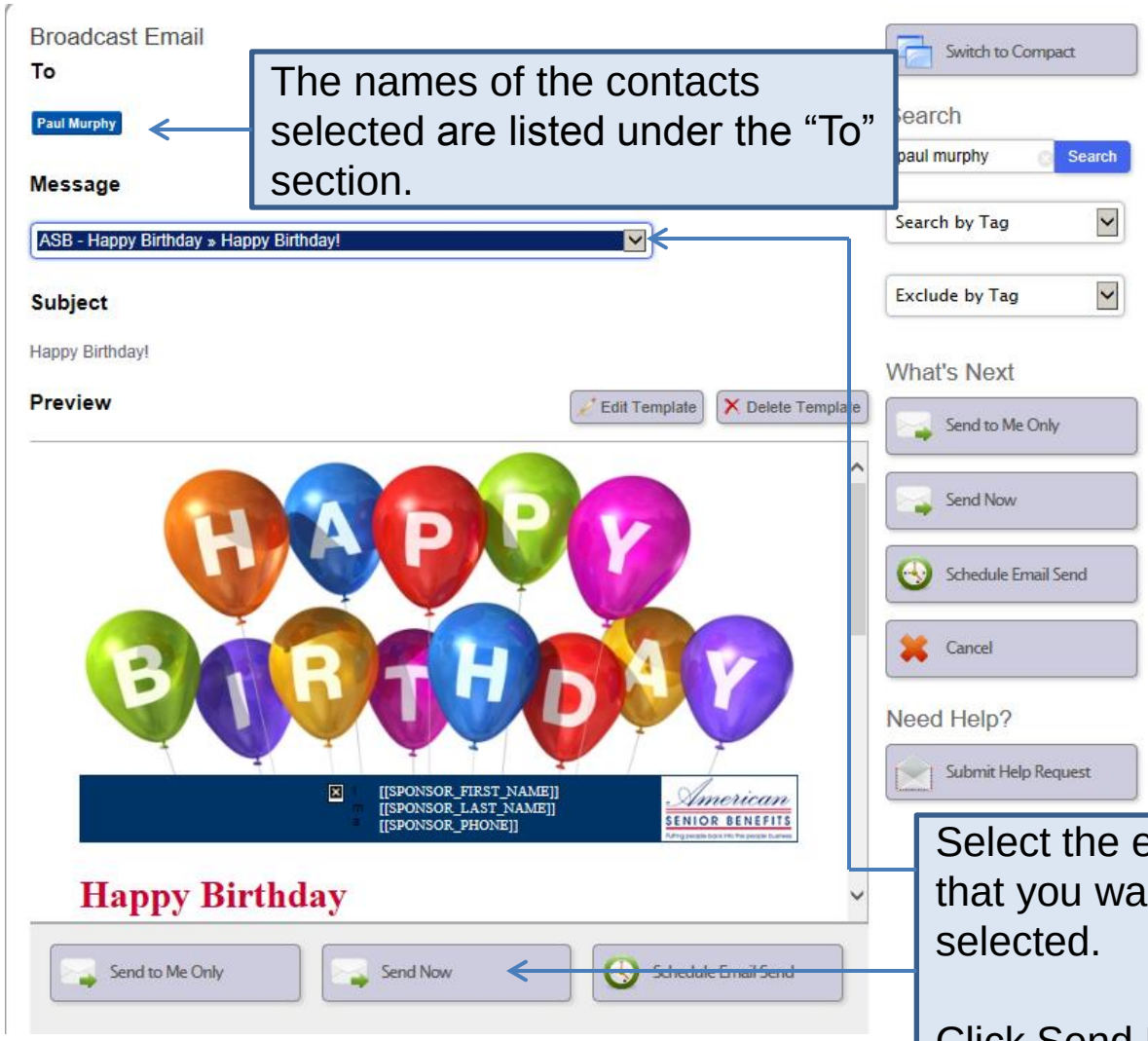
Use the checkboxes on the left to select all the contacts that you want to email.

Sending the Email



Click “Broadcast Email” button on the right and follow the instructions on that page.

Select and send Message

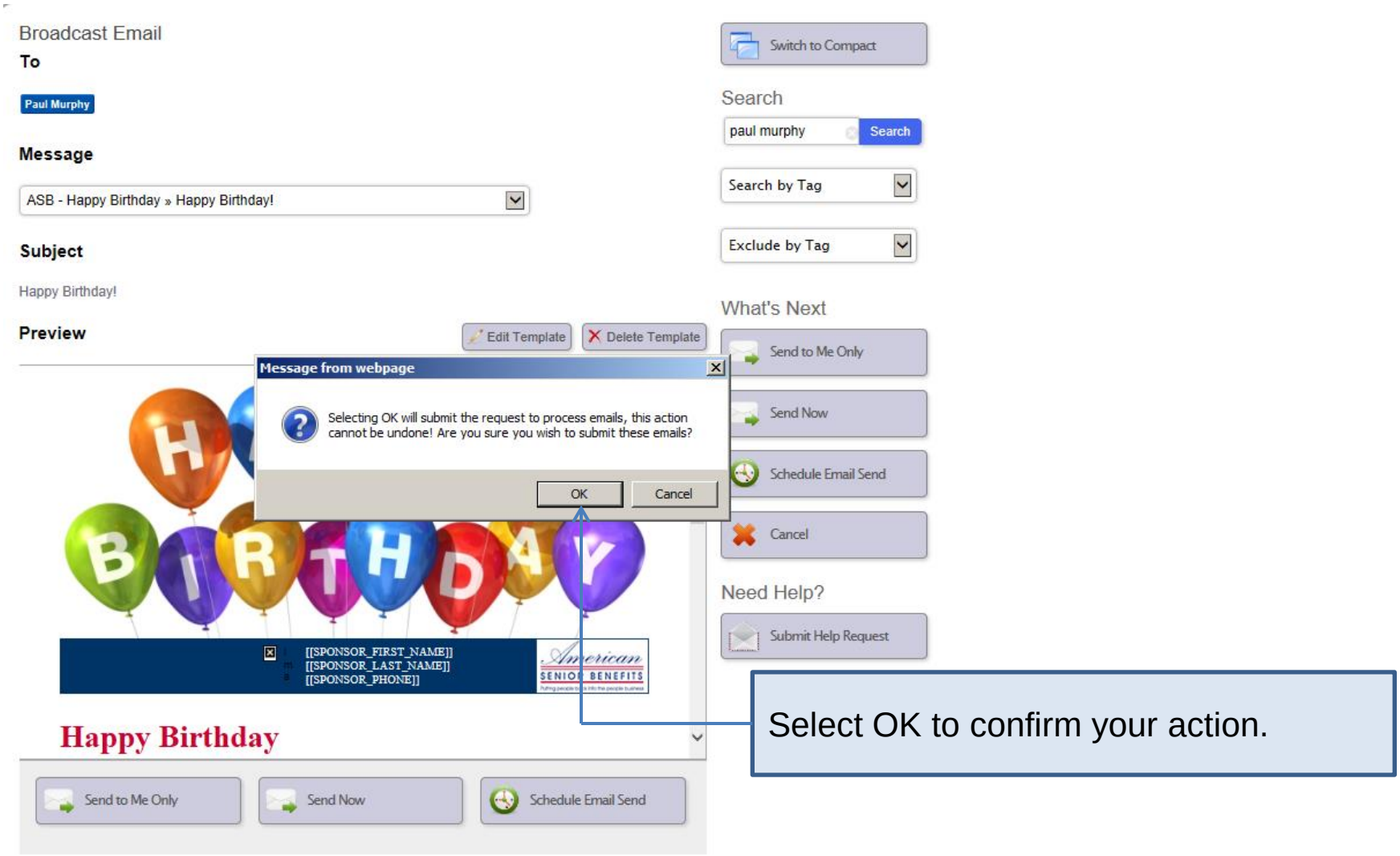


The names of the contacts selected are listed under the “To” section.

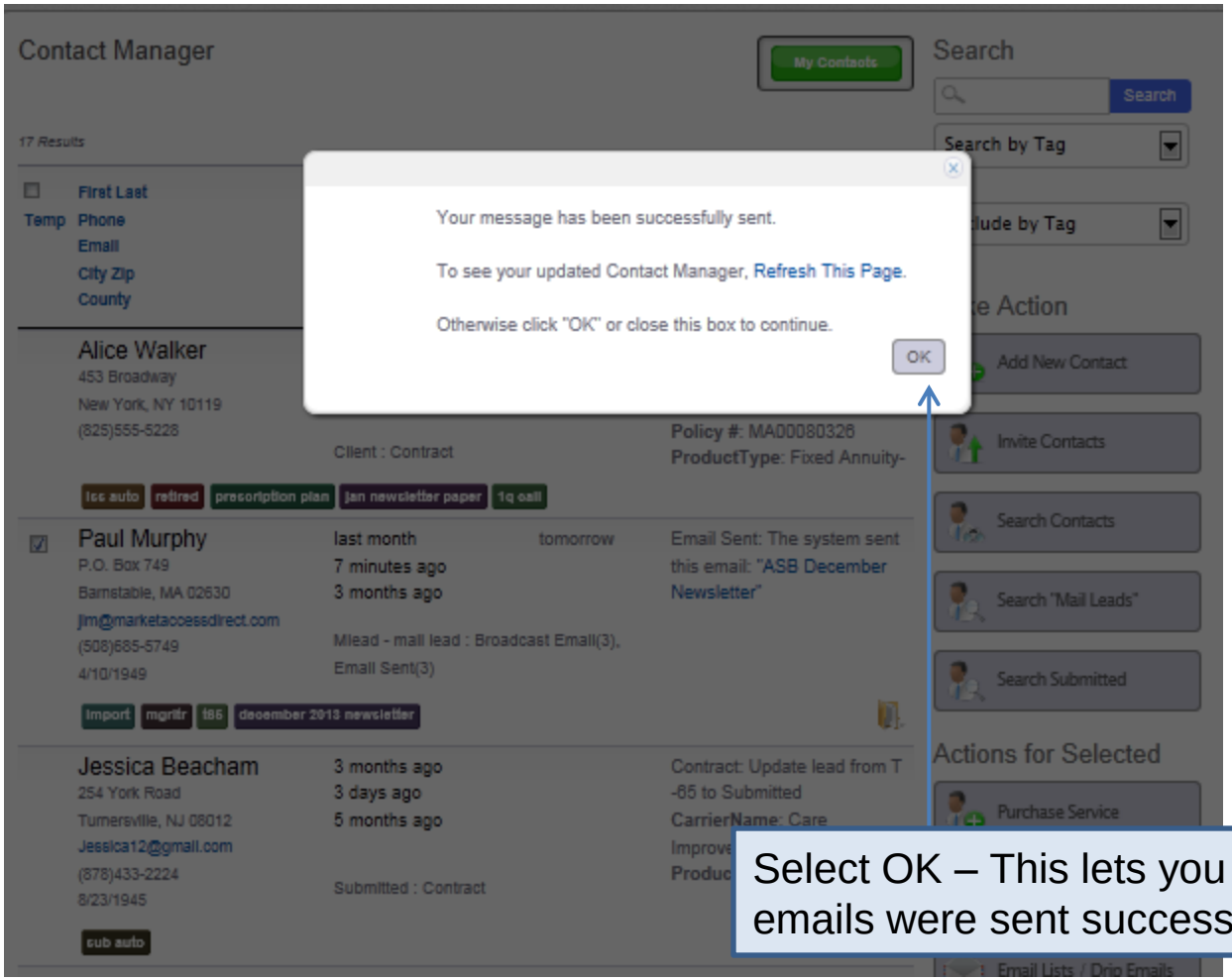
Select the email from the dropdown list that you want to send the people you selected.

Click Send Now.

Send message

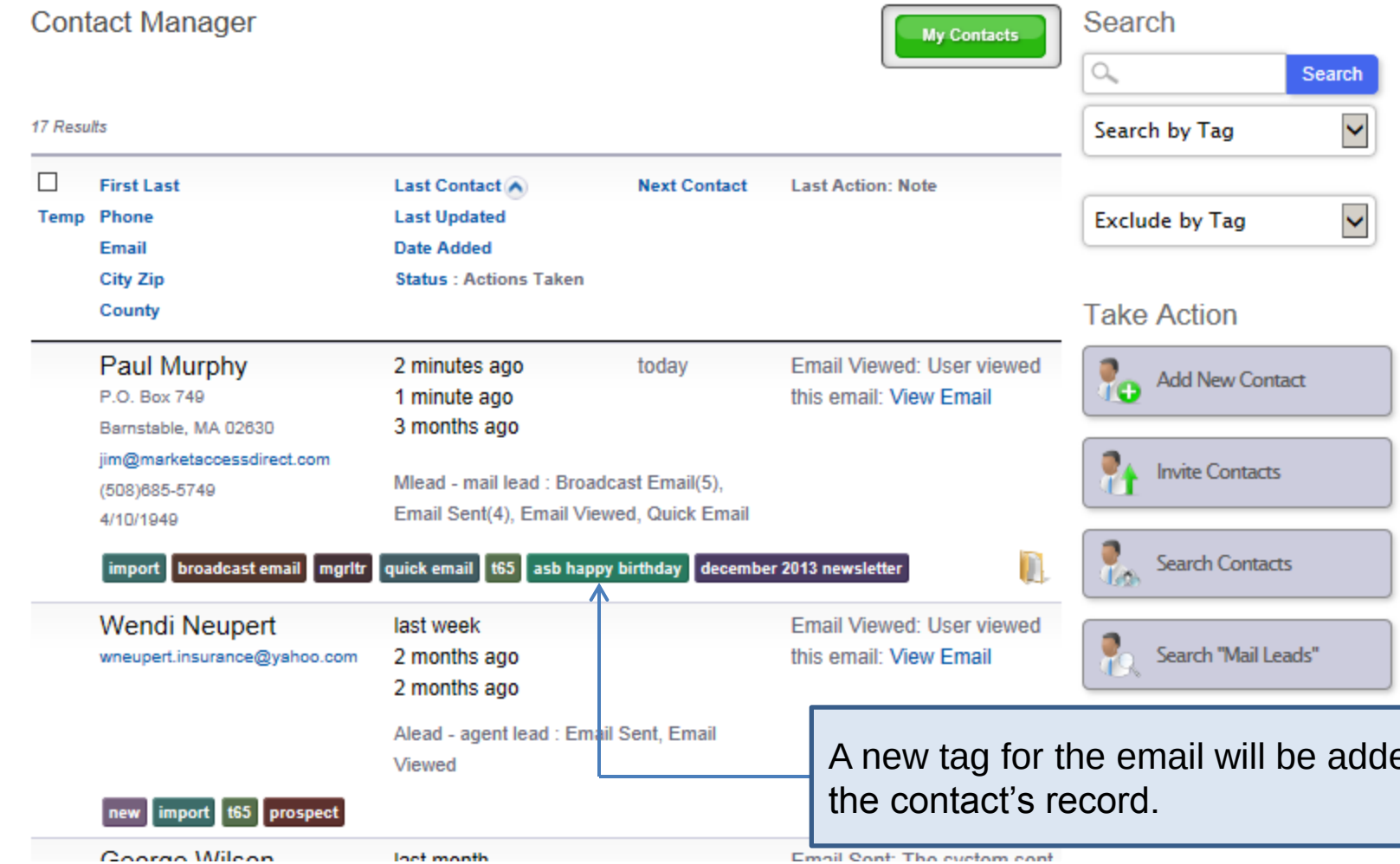


Send message



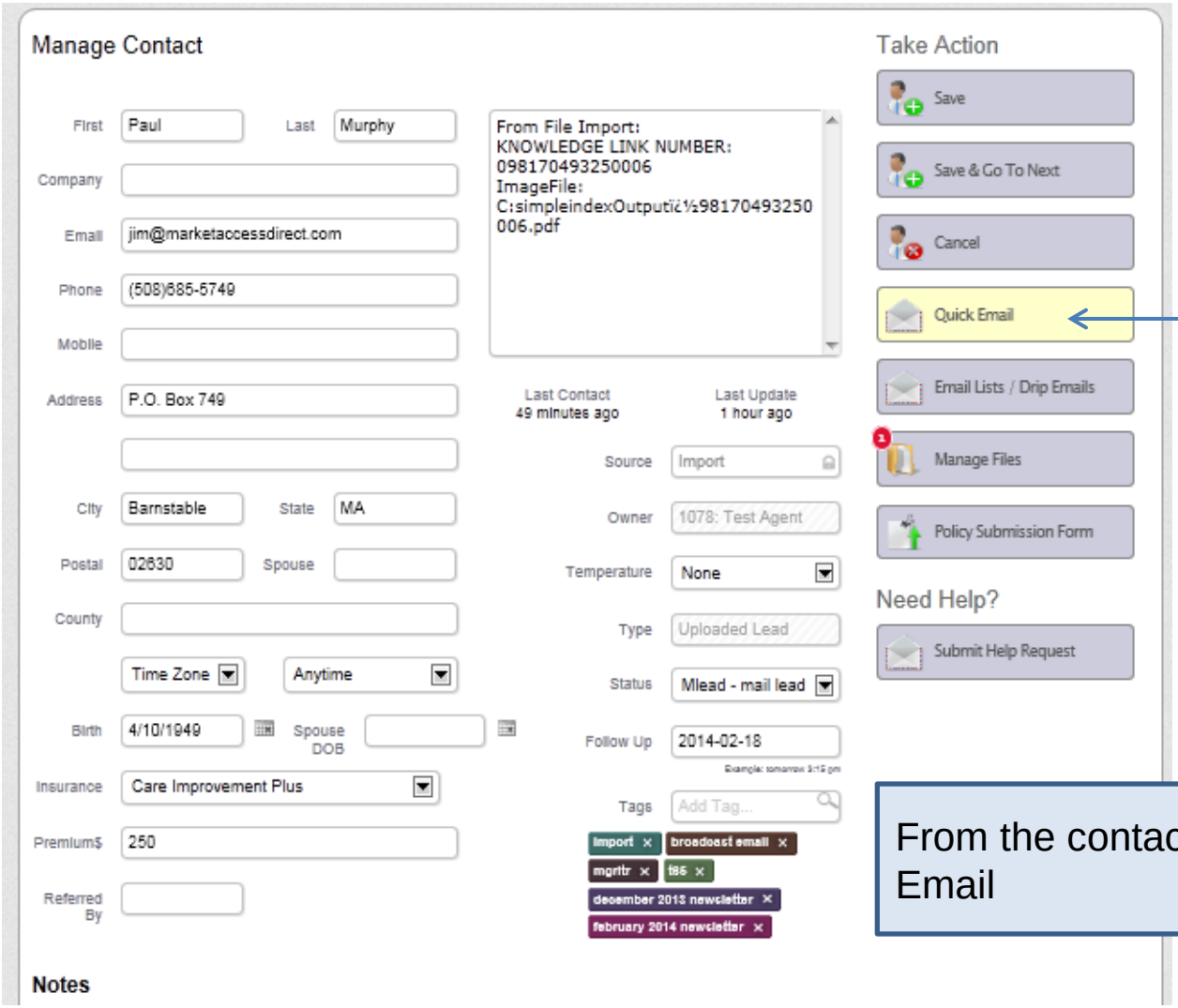
Select OK – This lets you know your emails were sent successfully.

Tag added



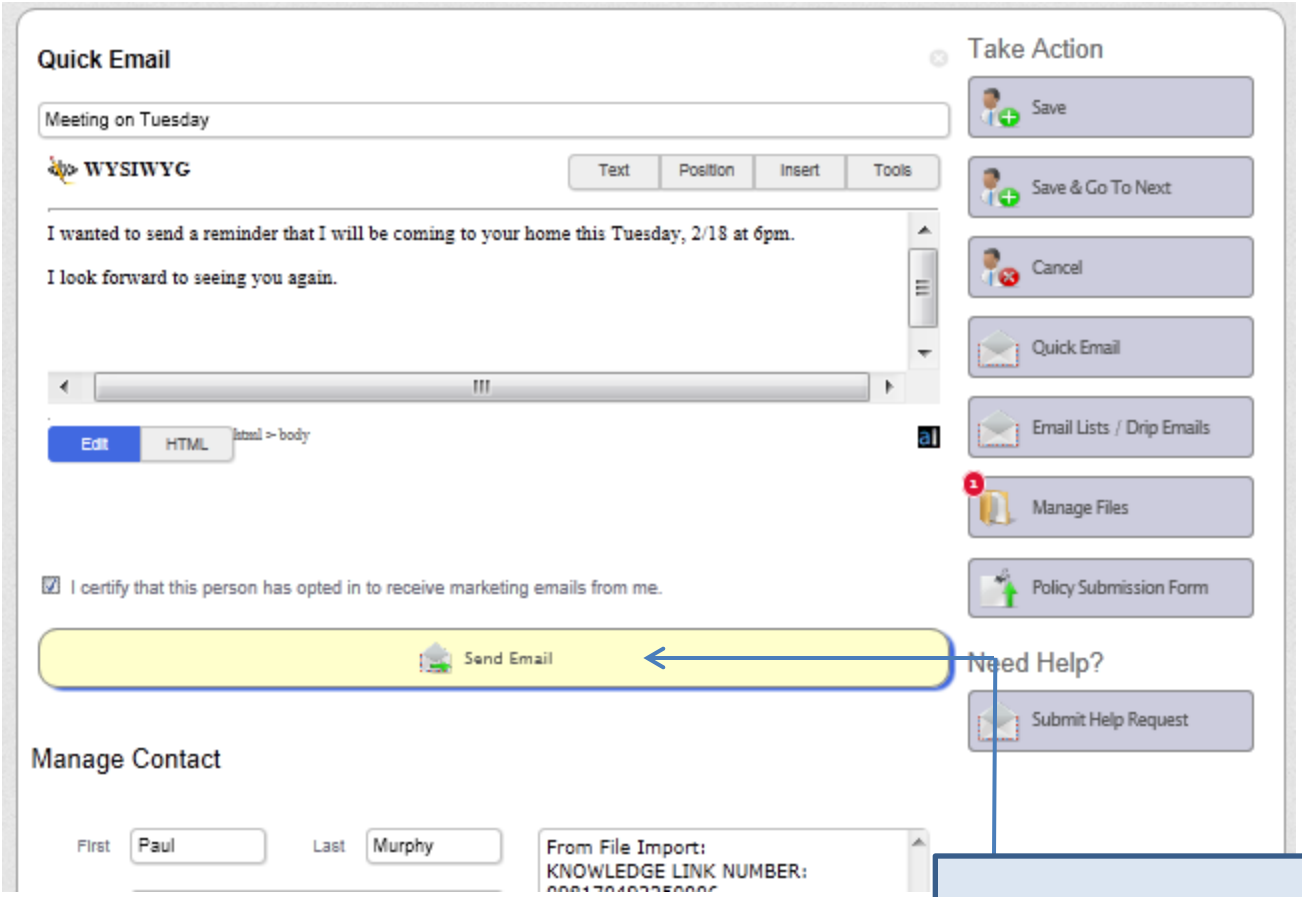
A new tag for the email will be added to the contact's record.

Quick Email



From the contact record select Quick Email

Quick Email



Enter you message, check the opt-in box, and click Send Email.